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COMMISSIONER

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Asset Ordering Overview

Procurement requests to order any item that must be tagged as "Sensitive" (meaning it has a State Tag number, hereafter referred to as an "Asset") are handled differently from other kinds of orders. The main reason for this is because **any item that must be tagged in the Assets module has to have an Edison Item ID that is properly set up as an Asset Item.** This causes problems for any items that would previously have been ordered under the "As Per Catalog" (APCAT) principle, along with any one-time Purchase that would normally be entered as a Special Request.

To determine whether or not an item is likely to be an Asset, please consult the section of the POST User Manual beginning on page 96. This manual is accessible through the following link. (http://www.intranet.state.tn.us/generalserv/fiscal/documents/postuserman.pdf) The main page for the Assets Division is located at the Office of Administrative Services Property of the State of Tennessee website, http://www.intranet.state.tn.us/generalserv/fiscal/ofmpost.html .

The section below is a brief summary of the asset guidelines. However, **this information is subject to change**, and it would be best to consult the OAS POST website prior to ordering.

Asset Guidelines (as of 5/26/2009)

Requirements for an item being marked as an Asset

A. All equipment purchases with a cost of $5,000.00 or more including freight and set up costs (labor) should be a “716” account code.

B. All equipment purchases with a cost between $100.00 and $4,999. to include freight and set up costs (labor) and listed here should be an account code 70999000 (sensitive minor equipment) or 72299000 (sensitive computer equipment). These are classified as sensitive items and are determined by Asset Management.

Sensitive Item Listing:
****Subject to change**

BAR CODE SCANNERS
BOAT MOTORS
BOAT TRAILERS
BOATS
CAMERA BODIES (35mm & DIGITAL)

CAMERA LENS (200MM OR LARGER)
CANOES
COMPUTERS, <u>ALL TYPES</u>
DIGITAL VOICE RECORDERS
PDA
COMPUTER PERIPHERALS (EXTERNAL)
GLOBAL POSITIONING SYSTEMS
GEOGRAPHIC INFORMATION SYSTEM
COLOR BAR GENERATORS
DVD PLAYERS/RECORDERS
FAX MACHINES
HAM BAND TRANS/REC (HAND HELD)
LCD/MULTIMEDIA PROJECTORS
MARINE BAND TRANS/REC
NIGHT VISION SYSTEM
OSCILLOSCOPE
POWER SUPPLIES
RADIO SCANNERS
SPECTRUM ANALYZER
TELEVISIONS
TWO/WAY RADIO TRANS/REC
VECTOR SCOPES
VIDEO CAMERAS
VIDEO RECORDERS & PLAYERS
WAVEFORM MONITORS

C. <u>All</u> **weapons** are to be tagged and added to POST regardless of cost. Weapons less than $5,000.00 should be coded to 70999000 as sensitive; weapons $5,000.00 or more are coded as 71617000. Examples are:

PISTOLS (NOT PELLET or AIR)
RIFLES (NOT PELLET or AIR)
SHOTGUNS
STUN GUNS (TASER)
TEARGAS GUNS

D. **Computer Systems** comprised of a monitor, keyboard and central processing unit are to be tagged as one unit.

E. External computer peripherals with a cost between $100.00 and $5,000.00 are to be tagged individually. Examples are:

EXTERNAL STORAGE DEVICES
EXTERNAL TAPE DRIVES
EXTERNAL MODEMS
POWER SUPPLIES
PRINTERS
SCANNERS
CD WRITERS
DOCKING STATIONS

F. Additional purchases for existing equipment <u>totaling</u> $5,000 or more including labor is classified as an upgrade having a “716” account code and the dollar value added to the asset. Additional purchases for existing equipment <u>totaling</u> less than $5,000 will not have the dollar value added.

G. Software will be tagged if the cost is $5,000.00 or above and is mainframe or mid-level based (including server-based). Software that is PC-based will not be tagged.

H. Donated equipment items that meet the above criteria should be added based upon estimated fair market value at the date of donation.

I. Equipment manufactured for use within the department that meets the other requirements should be added. Cost must include labor and materials.

J. Items purchased not meeting the above criteria may be entered by Asset Management upon request at the discretion of your department.

K. Equipment purchased from the State and Federal surplus warehouse that meet the above criteria should be tagged.

L. Examples of items ***NOT*** to record

ALARM SYSTEMS WHERE THE WIRING IS BUILT-IN
ATTACHED MIRRORS, CHALKBOARDS AND BULLETIN BOARDS
ATTACHED SHELVING, CABINETS AND COUNTERS
AWNINGS AND BLINDS
BOWLING EQUIPMENT
CARPET
DOORS OF ALL KINDS
DRAPERIES AND CURTAINS
STAGE LIGHTING, RIGGING AND TRACKS
FIXED AUDITORIUM SEATS
FOLDING BLEACHERS WHEN ATTACHED TO THE WALL
GRILLS GAS AND CHARCOAL THAT ARE PERMANENT
HANDICAP RAMPS AND LIFTS
REPEATER STATIONS THAT ARE PERMANENT
IN-GROUND LIFTS
IN-WALL FOLDING CAFETERIA TABLES AND BENCHES
LANDSCAPE FURNITURE PERMANENT
PLAY GROUND EQUIPMENT THAT IS PERMANENT
PUBLIC ADDRESS SYSTEMS WHERE WIRING IS “BUILT-IN”
RADIO TOWERS THAT ARE PERMANENTLY ATTACHED
SPRINKLER SYSTEMS THAT ARE “BUILT-IN”
WATER AND FUEL TANKS, IN-OR ABOVE GROUND, THAT ARE PERMANENT
WATER FOUNTAINS
GARBAGE DISPOSALS
WATER HEATERS
CENTRAL HEAT AND AIR UNITS

Requesting Item IDs for Asset Items

Item IDs must be requested from the Content Group. To request an Item ID, you must send a request to get Asset Items created. Content will send you a copy of the **Spreadsheet Guide for Agencies** along with a copy of the **TN CG Item Only Layout** spreadsheet. This spreadsheet must be completed according to the guidelines and returned to the Content Group to have your Item IDs created. **<u>This is the only acceptable format</u>.**

The Content Tool in Edison is used to create Item IDs, and the *<u>only</u>* format it can read is the exact format included in the **TN CG Item Only Layout** spreadsheet. Due to the volume of requests, it is not possible for Content to take PDF scans, Word document specifications or any other file-type and create a Spreadsheet out of them. **Completion of the spreadsheet is the sole responsibility of the agency requester, not Content. Content can and will assist, but it is necessary for the agency requester to complete the spreadsheet.**

Identifying Asset Item IDs

After the Content Team has created Asset Item IDs, they can be used to create Purchase Orders. There are two types of "Asset" Item IDs that are created, **Specific Assets** and **Generic Assets.**

- **Specific Assets** are used for specific items that have one set price. These can either be from lines on a contract (similar to non-Asset Contract lines) or from One-time Purchase requests. If the item is only going to be used once, it will be inactivated after usage, but **<u>it still must be requested and set up in the same way.</u>**

- **Generic Assets** are a generic description that covers a broad category of possible items. Specific details on the item must be attached separately. They are used to handle the problem of items from "APCAT" contracts that must be tagged.

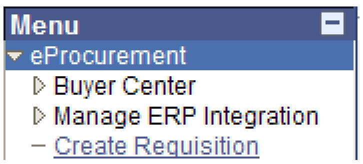
The Content Team will e-mail your Asset Item IDs to you after they have been completed. Depending on whether the Asset created is a **Specific Asset** or a **Generic Asset**, the ordering process will be slightly different.

Ordering Assets

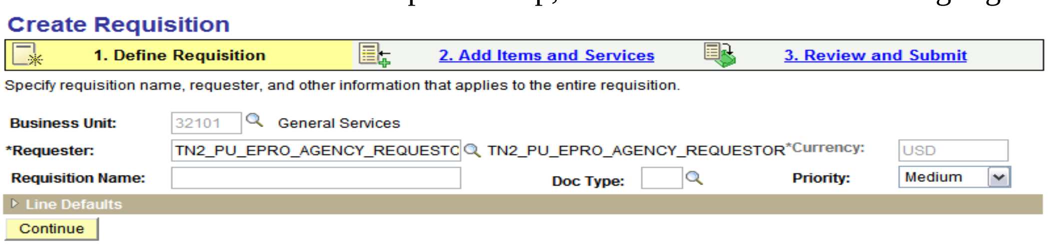
This section is for use ONLY with Edison Item IDs provided by the Content Team!

1) You must first be logged in to Edison. After logging in, click the **FSCM** link under the Enterprise menu, on the left side of the page.

2) The next step is to navigate to the **Create Requisition** page. Click on **eProcurement** from the left-hand menu. Then click **Create Requisition**, as shown in the picture below.



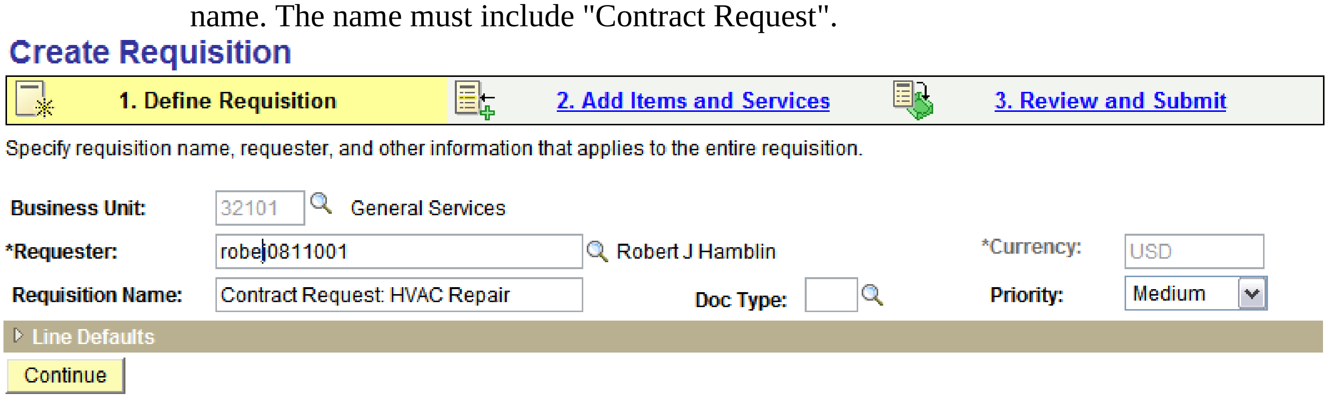
3) Clicking on Create Requisition will bring up a new page, with a title saying **Create Requisition**. This page has links to required sections, grouped under three main tabs. These are numbered in a strip at the top; and the current tab will be highlighted in yellow.

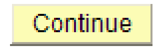


Step 1: Define Requisition

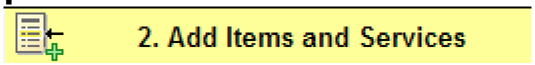
4) To create a Requisition, the Define Requisitions tab should be highlighted in yellow. If not, click on Define Requisitions. Make sure the Business Unit and Requester defaulted in correctly.

   a. **Requisition Name** Click in the **Requisition Name** field and then type in the name. The name must include "Contract Request".



5) After naming your Requisition, click the Continue Button. 

Step 2: Add Items and Services

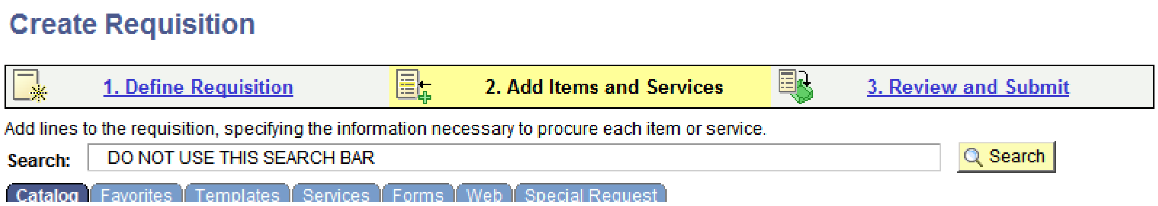


6) The next step is to add items to the requisition.

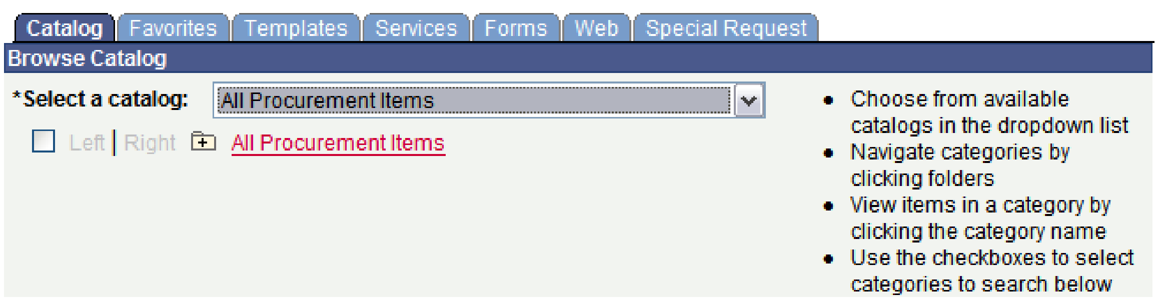
7) The main **Add Items and Services** page has 7 tabs at the top, all showing different ways to create Item Lines on a Requisition. For Contract Requests, you will use the **Catalog** tab.

To search for items:

- First, click on the Catalog tab under the Search bar.

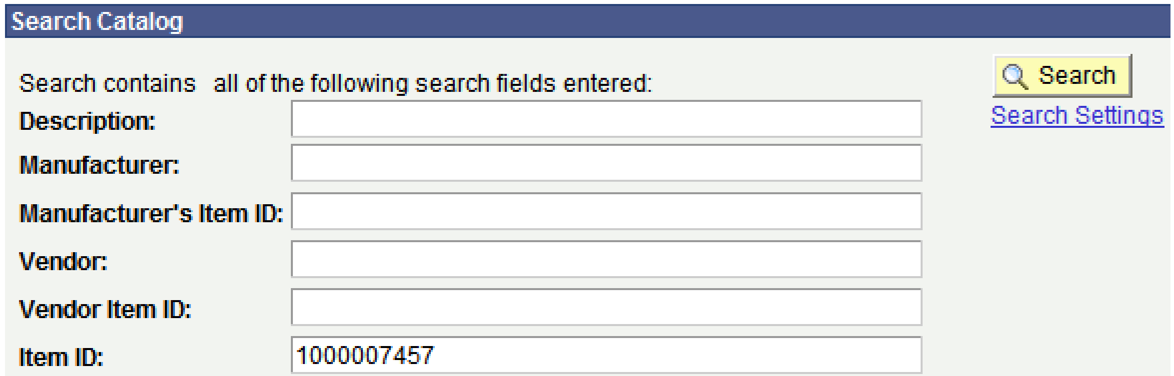


- Next, make sure the **All Procurement Items** catalog is selected from the drop-down menu. This should show as the default option when the Catalog tab is selected.

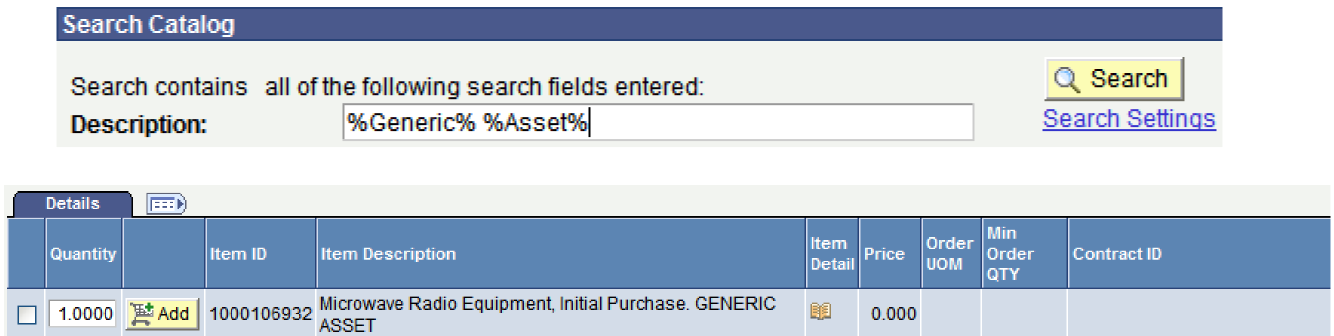


- Underneath the catalog listing is the **Search Catalog** section. This contains fields to search by different listings. **This is the ONLY search field that should be used, NOT the one that's at the top of the screen.**

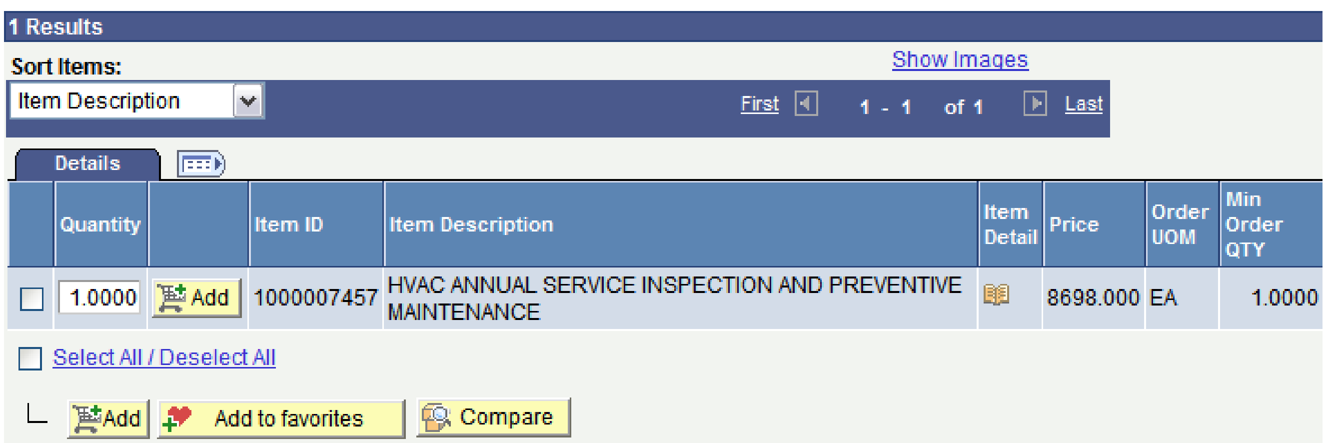
- Type the first Item ID (obtained from the Content Team) into the **Item ID** field, then press the Search button. An example is shown below.



- If you are ordering a "Generic Asset" item, search for "%Generic% %Asset%" with no quotes.



8) If any items meet the search criteria used, they will be displayed below the **Search Catalog** section. The results appear in a table format, with named headers at the tops of the columns.



If the item you need was located by the search, check the box next to the item to include the item on the Requisition. Then type the Quantity in the Quantity field.

	Quantity		Item ID
☐	4.0000	Add	1000007457

9) After inputting the desired quantity, click the Add (Add) button. Once added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.

Requisition Summary		
Description	Qty	UOM
HVAC ANNUAL SERVICE INSPEC...	4	EA
Total Lines:	1	
Total Amount (USD):	34,792.00	

10) Repeat this process for all additional lines that must be on the contract. After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Step 3: Review and Submit

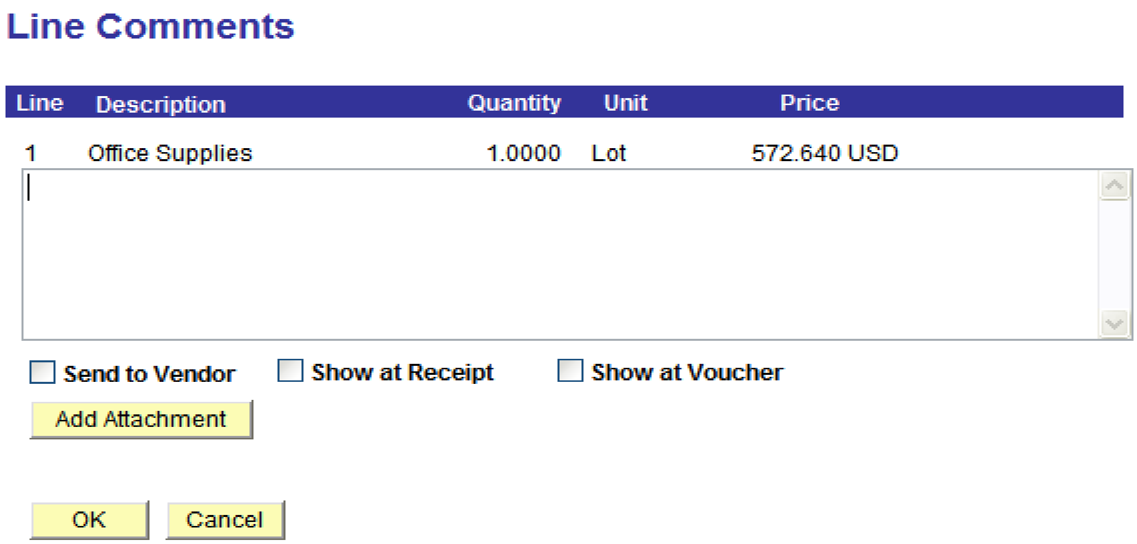
3. Review and Submit

Reviewing and Submitting Requisitions:

The last step of the eProcurement process is the **Review and Submit** page. It contains a summary of the Requisition information, along with notes and Justification. The first thing you must do on this page is enter your Document Type. For Contract Release Orders, use **DCR**. If this is a One-Time Purchase of an Asset, use **LPA.**

Business Unit:	32101 General Services				
***Requester:**	robej0811001 Robert J Hamblin			***Currency:**	USD
Requisition Name:	Guard Services	**Doc Type:**	DCR	**Priority:**	Medium

1) You can now add any additional information to the **Line Comments** section. There is a Comments icon for each line, located on the far right of the page. Click the Comments icon ( ) to go to the Comments screen, where you can either type information directly into the field or add supplemental documents as attachments.

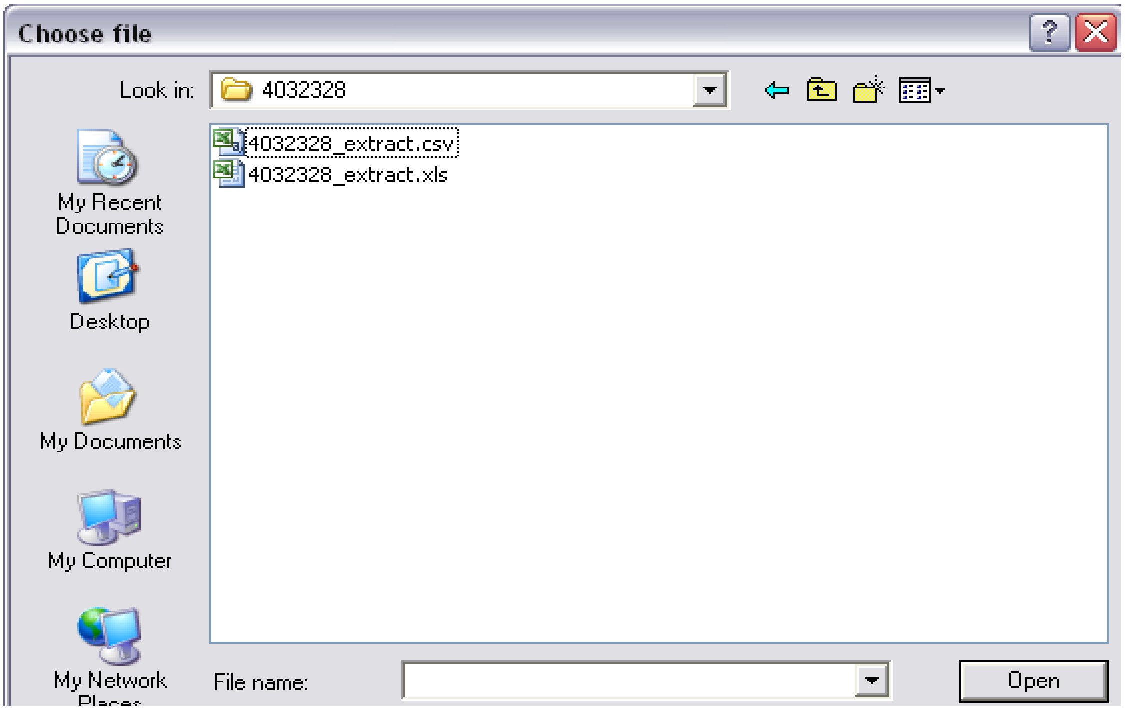


Note: If you are ordering a **Generic Asset**, you must include a full description of the item in the **Line Comments** section**.**

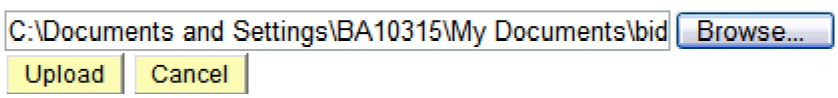
To attach any supplemental information that is contained in a separate Word, PDF or Excel document:

1. Click the **Add Attachment** button. (Add Attachment) This takes you to the Add Attachment page.

2. Click the **Browse** button (Browse...). This opens up a window to let you search for files on your computer.



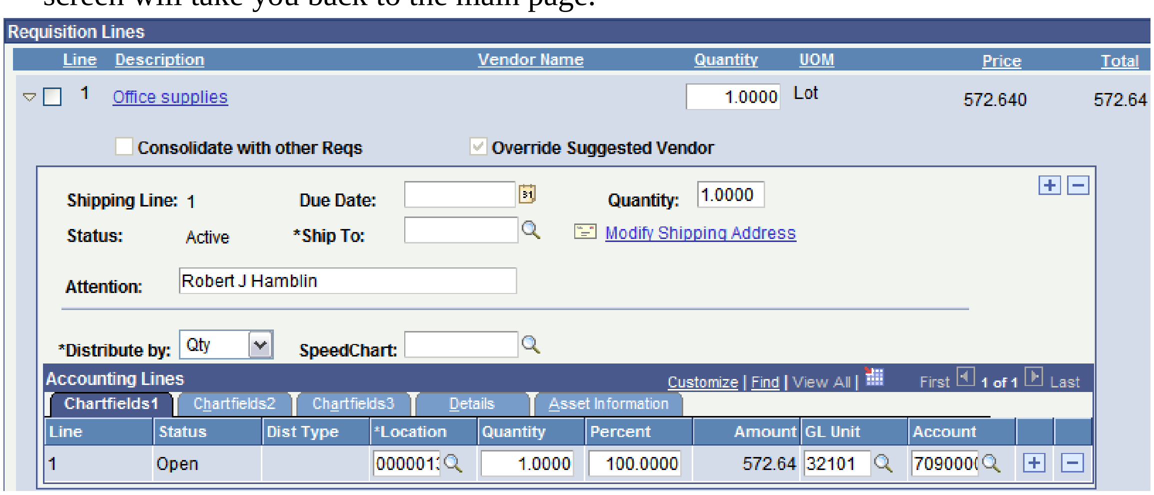
3. Select the file, then click the **Open** button (Open). This takes you back to the Attachment page, with your filename located in the window.



4. Click the **Upload** button (Upload) once the file is found.

5. Repeat for all necessary files on that line.

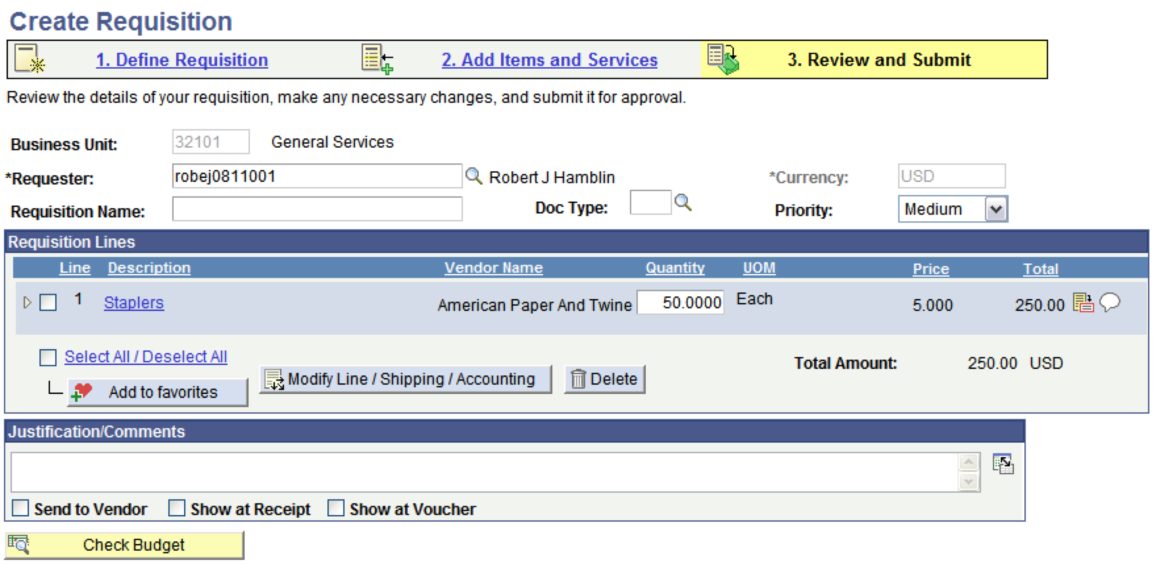
2) Once all Attachments and Comments are entered, clicking OK on the Line Comments screen will take you back to the main page.



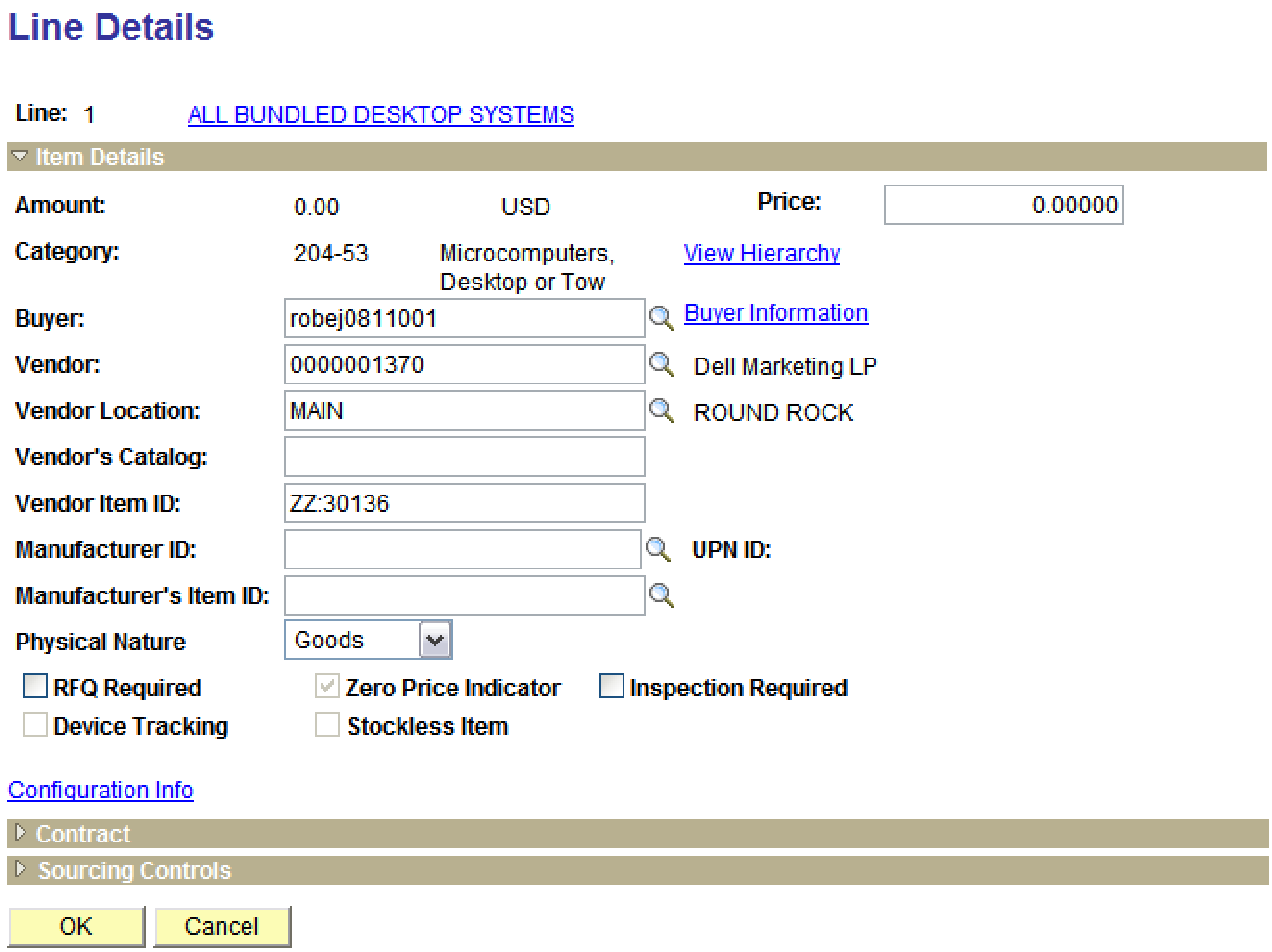
Note: Ordering Generic Asset Items

You must enter supplemental information on the Line Details screen to be able to process the order.

On the main Review and Submit page, scroll to the right of the screen and click on the **Line Details** icon. This is located next to the Total (shown below as 250.00).



Clicking the **Line Details** icon will bring you to the **Line Details** page.



*Note: If you cannot see the "**Price**" field, you will need to contact the Content Team to see if the item is set up properly. If the item is set up properly (as confirmed by the Content Team), you will need to contact the Edison Help Desk to have the correct Requester Setup added to your access.

- **Price:** Change the price to reflect the vendor's true price.
- **Vendor:** Select the vendor to be used.
- **Vendor Location:** Select the correct Vendor Location.
- **Vendor Item Number:** Enter the correct Vendor Item Number.

3) Then press the OK button at the bottom of the page to return to the main Review and Submit page.
4) Once all attachments are included for each line, review the lines to make sure they are correct. To view the entire line table, scroll to the right using the scrollbar at the bottom of the screen.

Possible Changes:

Altering Quantity:

The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

Deleting Lines:

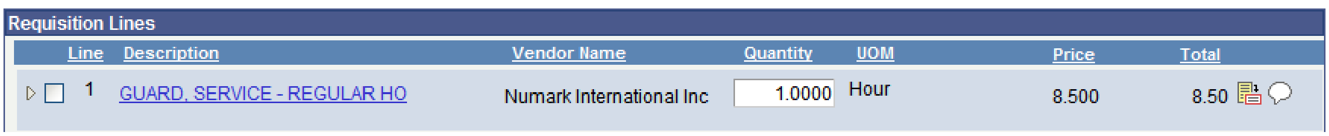
If a line needs to be deleted, click the check box next to the line, then press the Delete button. This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it.**

Sections to Review/Modify:

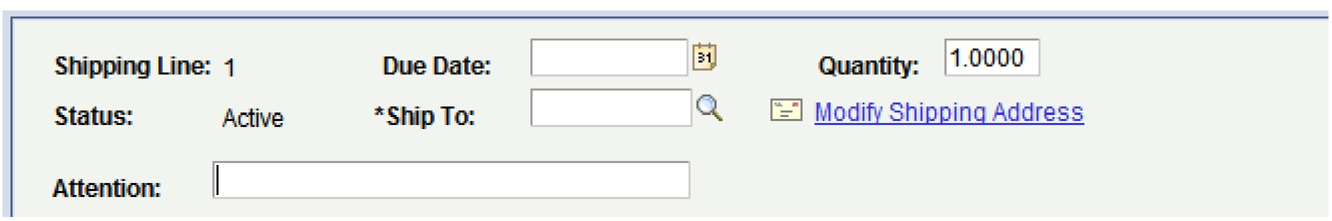
Linking to Work Orders:

THIS IS REQUIRED!

To link to a FMAX Work Order, you must use the **Ship To** and **Attention** fields.



You must first expand the table by using the Expand Section button ( ).



This will show the ***Ship-To** field. It may be blank, or may default to PMFMSHIPTO, both of which must be changed.

- Click the Lookup Icon ( ) next to the Ship-To field. This brings you to the Look Up Ship To page. This page is the first step of linking to a FMAX Work Order.

Look Up Ship To

SetID: SHARE
Ship To Location: begins with
Description: begins with

Look Up | Clear | Cancel | Basic Lookup

- Use the Look Up Ship To screen to find the location. Type **PS** into the **Ship To Location** field and **FRF** into the **Description** field.

Look Up Ship To

SetID: SHARE
Ship To Location: begins with PS
Description: begins with frf

Look Up | Clear | Cancel | Basic Lookup

Then press the Look Up button. This will pull up a list of Complexes.

Search Results

View All First 1-23 of 23 Last

Ship To Location	Description
PS00102	FRF ADMINISTRATION
PS00128	FRF ANDREW JACKSON DELTA
PS00103	FRF ANDREW JACKSON MAINT
PS00104	FRF CAPITOL MAINTENANCE
PS00105	FRF CHATTANOOGA MAINT
PS00106	FRF CORDELL HULL MAINT
PS00107	FRF DATA CENTER MAINT
PS00108	FRF GENERAL SERVICE MAINT
PS00109	FRF HORTICULTURAL MAINT

Click the location that seems correct. This will send you back to the main page. It may bring up a window that says "**Changing Ship To Location may change the Vendor information. (10150,193)**". If this appears, click the **Yes** button.

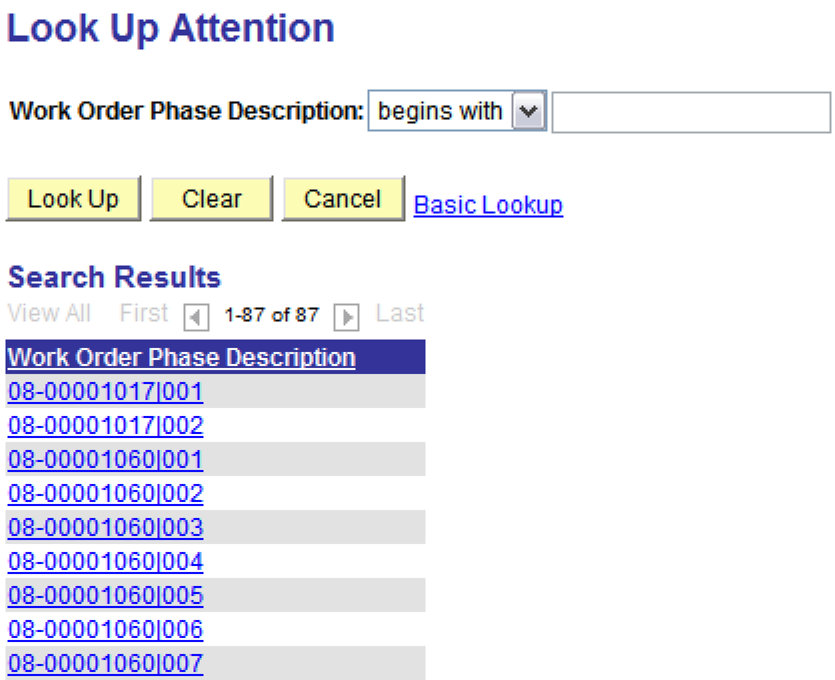
Changing Ship To Location may change the Vendor information. (10150,193)

When the Ship To Location is changed, the Item Default Vendor may change.

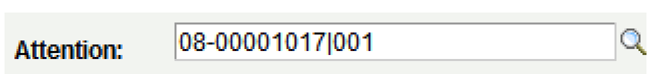
Yes | No

Once back at the main page, the next step in linking the Requisition to an FMAX Work Order is to pull up the specific Work Order number and Phase number.

To do so, you must use the Lookup Icon ( ) next to the **Attention** field**.** Clicking this icon brings up a list of Work Orders that are tied to the Complex chosen in the **Ship To** section.



Click the appropriate Work Order and Phase number from the list to return to the main page with the Work Order number filled in. **<u>This completes the process of linking the Requisition to the Work Order.</u>**



From here, you can continue on with the Requisition.

Chartfields:

All Chartfield ("Accounting") information should default in based on the User's Profile preferences.

Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.

- Location CF: Found on the Chartfields2 tab.

If this is not the case, this means one of two things. Either the user's setup is incorrect, or the user is a "Buyer" for many separate locations at an agency (Centralized Procurement).

- If the user's setup is incorrect, and they must contact the Edison Helpdesk to request that their access, rolemapping and preferences be corrected. They may need to work with their Agency Fiscal Office and Agency Security Administrator for more information on this process.

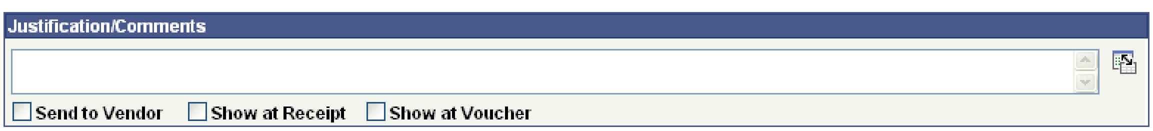
- If the user is a Centralized Procurement officer for many locations in their agency, they will have to work with their Agency Fiscal Office to obtain all the correct Chartfield information for each location they buy for.

The Central Procurement Office is not able to view, access, change or review individual Account Preferences, and does not have access to what the "correct" Account/Chartfield information should be for any given location. This is the sole responsibility of the Agency and Agency Fiscal Office.

- **Repeat as necessary for all lines**

Justification/Comments:

This section is located at the bottom of the Review and Submit page, and is used to record the justification for ordering an item from a contract. Click in the field and begin typing.



You must include:

- "Submitting Order for Asset Item." (This must be at the beginning of the comment)

- A detailed explanation of what the request is for. This would be something like "This is an order from Contract for Security Guard Services".

- Your contact information, including name and phone number.

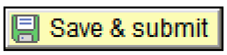
Once all this information is completed, you can review the Justification as a whole by checking the "Expand Section" button ( ).

After the justification section is completed, you must Budget Check the document.

Budget Check

1) To Budget Check the Requisition, press the “Check Budget” button. This must be completed in order to pre-encumber funds. The Budget Check Status will return as "Valid" once Budget Check is completed.

2) After Budget Check, press the “Save and Submit” button to send the Requisition for Approvals.

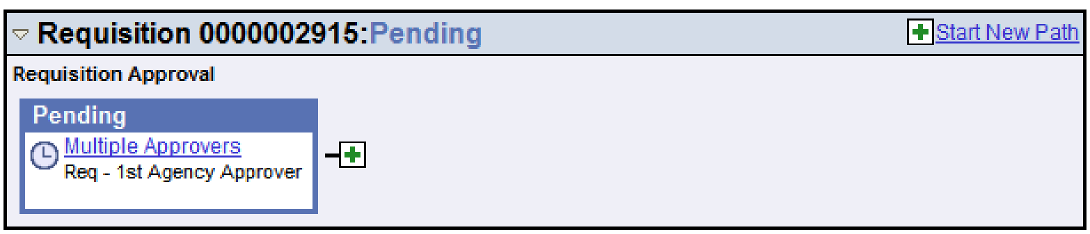


3) Once the Requisition has been saved, a screen appears showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later. This screen also shows the Approval paths.

Approvals

a) To view more information on the approvers, click on the “Multiple Approvers” (Multiple Approvers) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.

Stage 1 - Agency Req Approvals



b) T o add additional approvers, click the Insert Approver button. ( ) This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button ( ) next to the User ID field, then selecting the User ID from the list. ***The Approver you wish to add must be in the system as an Approver before you can select them.***

i. Use the Radio Buttons below the User ID Field ( ) to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers <u>*must*</u> approve to continue the process.

ii. After selecting the Approver's User ID and their function (Approver or Reviewer), click the Insert (Insert) button. This returns you to the main approval screen.

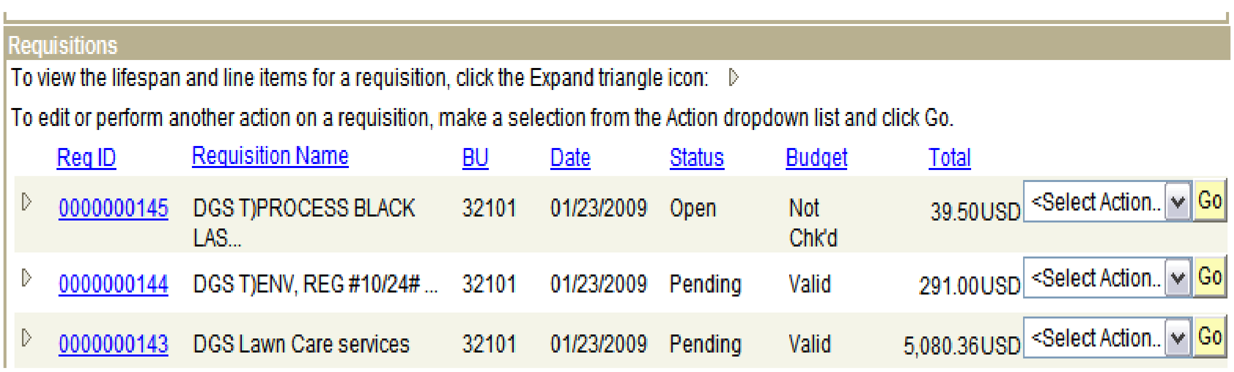
Requisitions must pass all approvals before being sent on to create a Purchase Order.

- **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item's NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all ***commodity approvals***.

- Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

To view the status of the Requisition, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.

Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (**Requisition ID:**).
The Approval Status and Budget Check status of the Requisition are listed in this table.



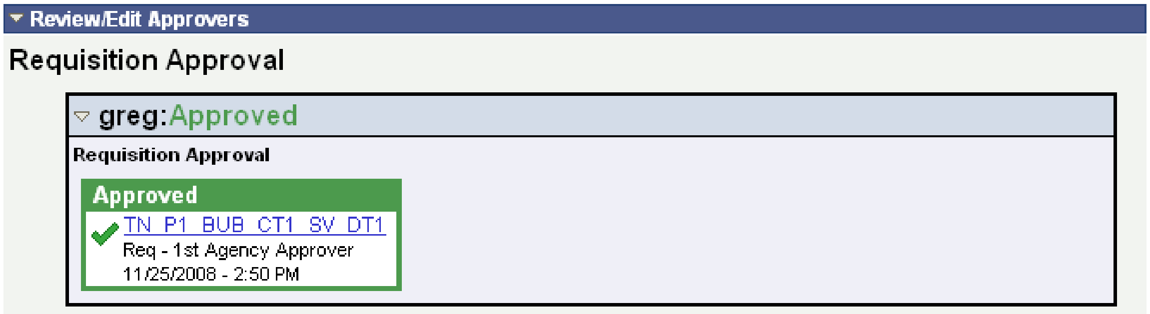
Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000000145	DGS T)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39.50USD	<Select Action.. Go
0000000144	DGS T)ENV, REG #10/24# ...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action.. Go
0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action.. Go

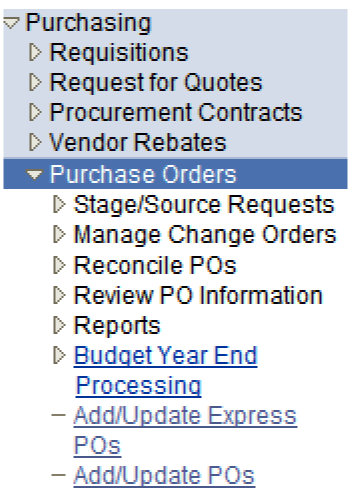
- Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.



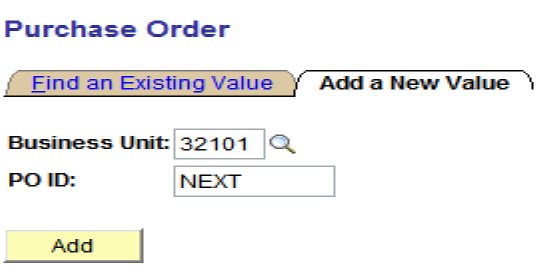
When the Requisition is approved, you are ready to proceed with creating the Purchase Order.

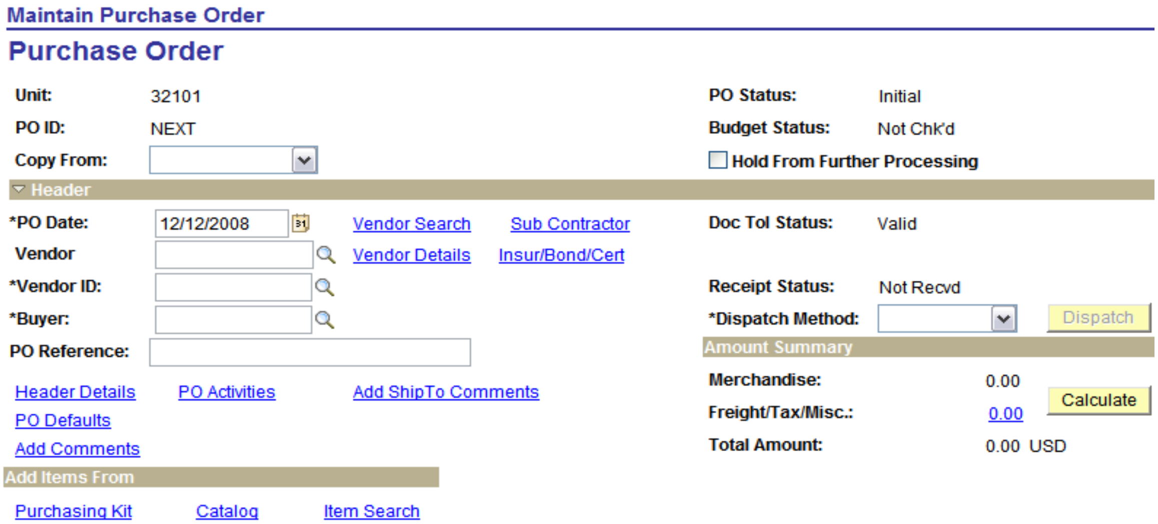
Creating Purchase Orders

1) Navigate to the Purchase Order page by clicking the **Purchasing** link from the menu, then clicking the **Add/Update POs** link.



2) This will bring up the Search page. Click the **Add New Value** tab and select the desired Business Unit for the PO. The PO ID will default in. Leave the field at NEXT. Click the **Add** button.

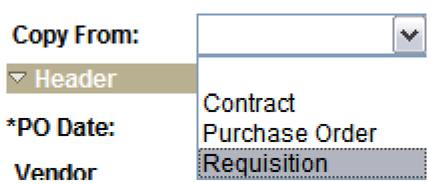




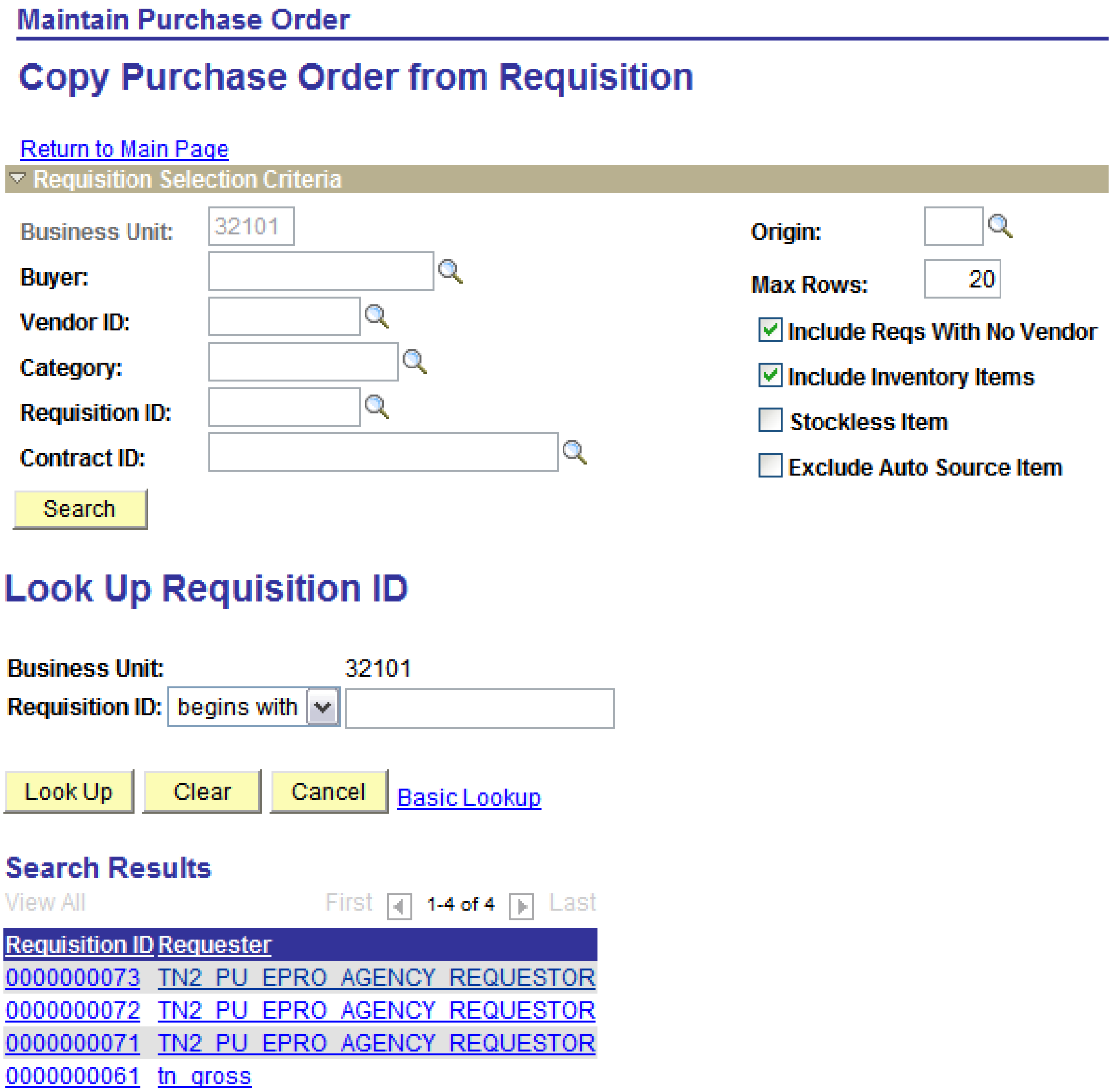
3) Enter the Vendor ID the Purchase Order is going to in the **Vendor ID** field. For Contract Release Orders, this will be found by looking at the Requisition lines for the contract Vendor assigned to the item.

4) Enter your Buyer ID in the **Buyer ID** field. To do this, click on the Lookup Icon ( ) located by the Buyer ID Field, then scroll through the list until you find your name. Click the link to return to the main page with the Buyer ID field completed.

5) For Contract Releases, you will be copying from a Requisition created by your Agency Requester. To do so, click the **Copy From** drop-down box, and select the **Requisition** option. To do this, you must first have entered the Vendor ID into the Vendor ID field.



6) This takes you to the **Copy Purchase Order from Requisition** page. It is shown on the first picture below. Click the Lookup Icon ( ) by the Requisition ID field to bring up the **Look Up Requisition ID** page, shown on the second picture below. Type in your Business Unit if it did not default and press the Search button to bring up a list of Requisition IDs. Find the Requisition you were assigned and click the **Requisition ID** link.



Maintain Purchase Order

Copy Purchase Order from Requisition

Return to Main Page

Requisition Selection Criteria

Business Unit: 32101

Buyer:

Vendor ID:

Category:

Requisition ID:

Contract ID:

Search

Origin:

Max Rows: 20

Include Reqs With No Vendor

Include Inventory Items

Stockless Item

Exclude Auto Source Item

Look Up Requisition ID

Business Unit: 32101

Requisition ID: begins with

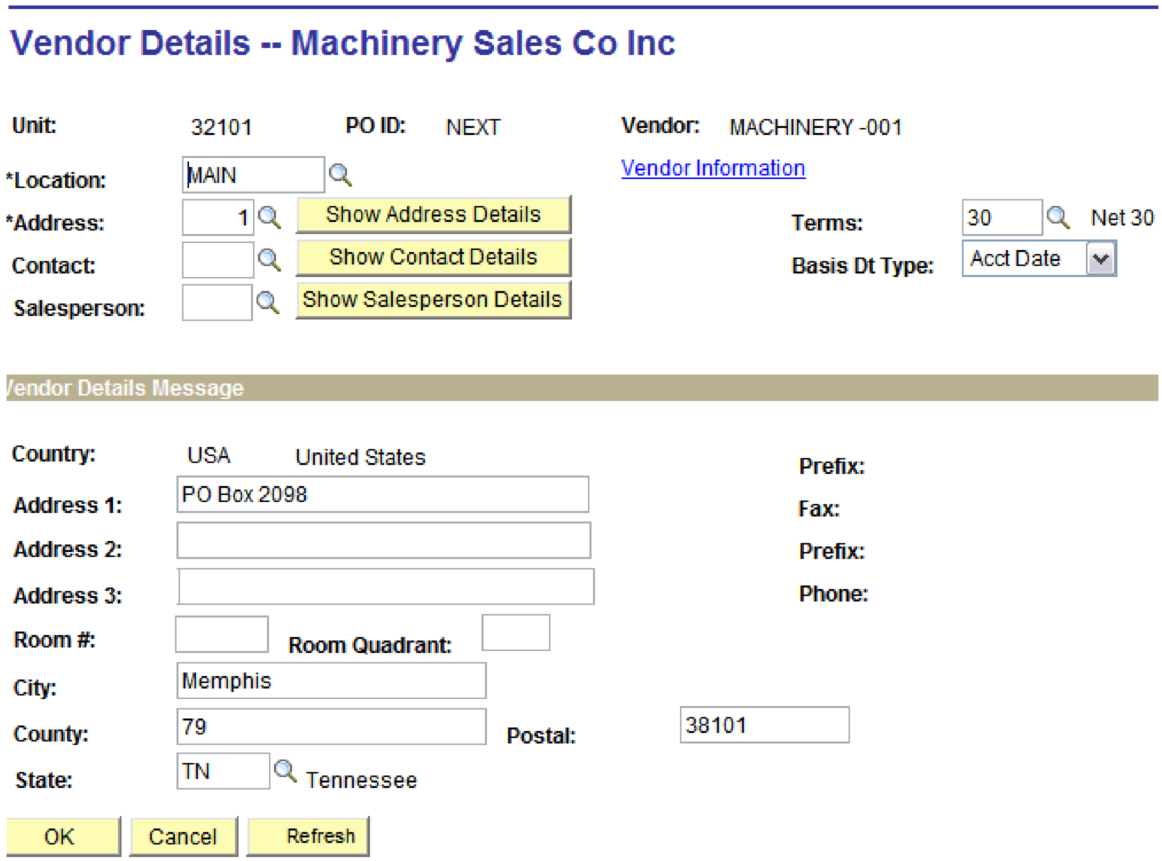
Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-4 of 4 Last

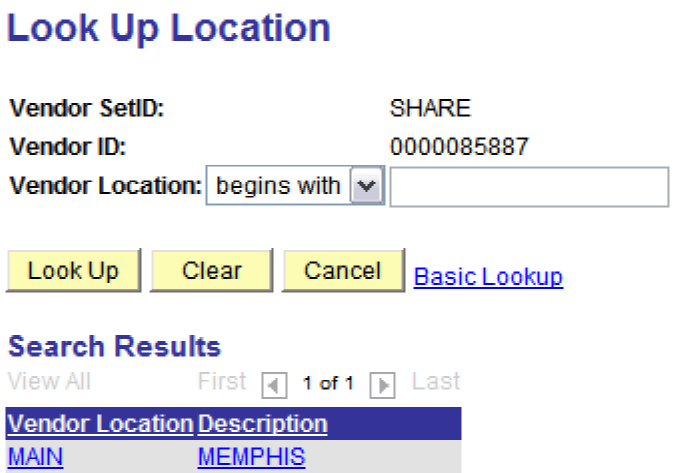
Requisition ID	Requester
0000000073	TN2_PU_EPRO_AGENCY_REQUESTOR
0000000072	TN2_PU_EPRO_AGENCY_REQUESTOR
0000000071	TN2_PU_EPRO_AGENCY_REQUESTOR
0000000061	tn_gross

7) Clicking the correct Requisition ID will bring you back to the **Copy Purchase Order from Requisition** page. Click the **Select All** (Select All) link to select all the lines for copying. Then click the **Copy to PO** (Copy To PO) button to copy the requisition lines over to the PO.



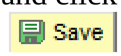
8) This should default in all the information from the Requisition, and return you to the main Purchase Order page. Click the **Vendor Details** (Vendor Details) link, which takes you to the Vendor Details page.

9) Check the Address listed to make sure the Vendor address is correct. If it is incorrect, use the Lookup Icon ( ) next to the **Location** field to select a different location and use the Lookup Icon ( ) next to the **Address** field to select a different address.



10) Once the correct address is entered, press the **OK** button at the bottom of the page to return to the main **Purchase Order** screen.

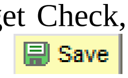
11) After reviewing all the information on the PO, return to the main **Purchase Order** page and click the **Save** button, located at the bottom of the screen.



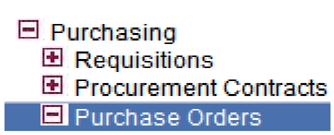
12) At this point, there are several other options that can be changed, but they should all default to the correct values. The defaults take information from your Buyer Profile and the copied Requisition and insert it automatically into the Purchase Order.

13) When all options are confirmed correct, you are now ready to Budget Check. This encumbers funds for the Purchase Order. To Budget Check, click the **Budget Check ( )** icon located at the top right of the page. It will show as Processing for a few seconds, then it will come back with **Budget Status**: **Valid**. An example is shown at the top of the next page.

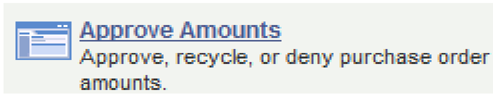
14) After completing the Budget Check, click the Save button, located at the bottom of the main **Purchase Order** page.



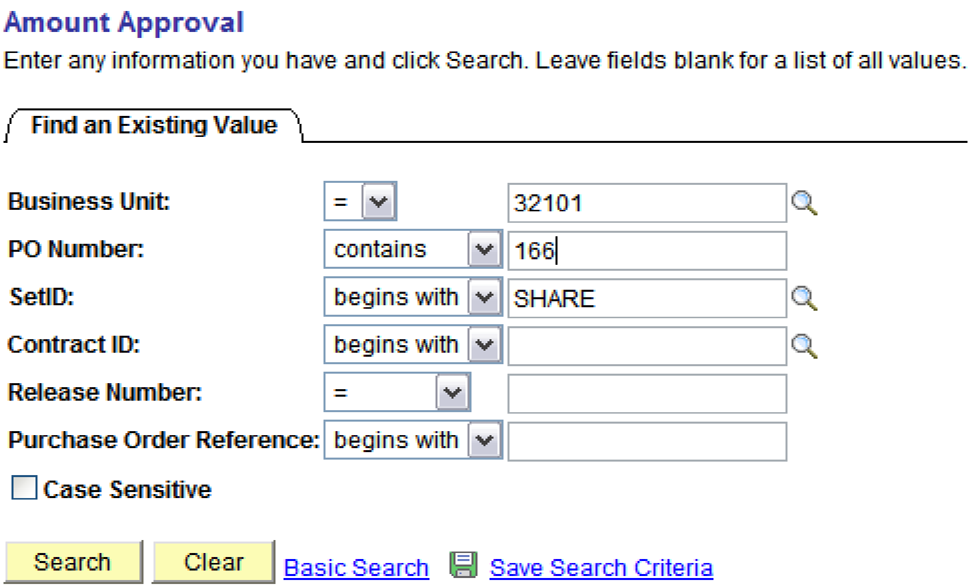
15) You must now submit the PO into Workflow. To do so, click the **Purchasing** link on the left-hand menu. Then click **Purchase Orders**.



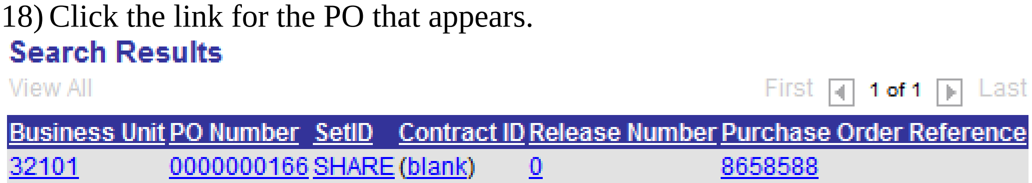
16) Click the **Approve Amounts** link under the Purchase Order section.



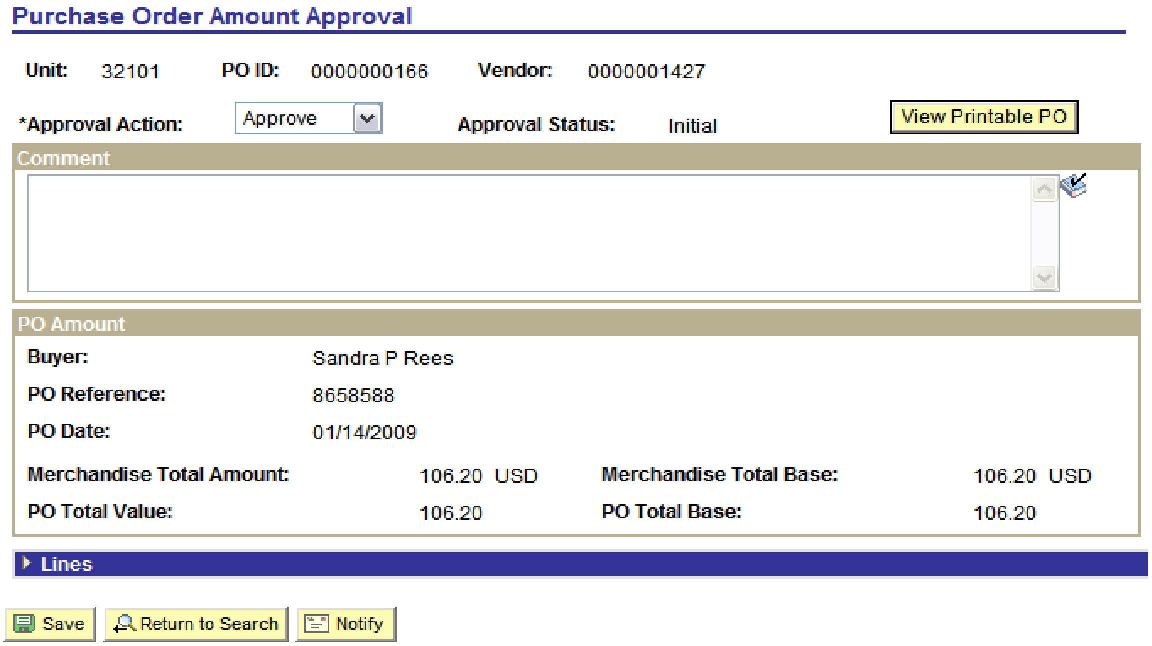
17) Use the Search screen that appears to find your Purchase Order by typing the PO number into the **PO Number** field and changing the drop-down box from **Begins** to **Contains**, as shown below. Then press **Search**.



18) Click the link for the PO that appears.



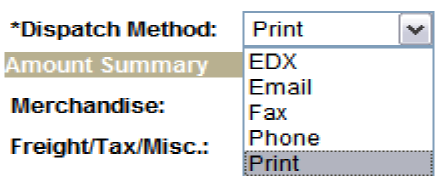
19) This will take you to the Approve Order Amounts screen, shown below. Make sure the drop-down box is set to **Approve**, then press the **Save** button. It defaults at **Approve**.



Once all approvals are met, the Purchase Order can be dispatched.

Dispatching Purchase Orders

1) Navigate back to the main Purchase Order page. The Purchase Order is now ready for Dispatch. Check the **Dispatch** drop-down menu on the main page, choosing either Print or E-mail. Do not choose Fax, EDX or Phone methods, as those are not currently supported.



2) Click the Dispatch button, which will only be highlighted if all approvals have been met. This will take you to the **Dispatch Options** page. Leave the options at default, then press the **OK** button.

3) A prompt will appear asking you if you wish to "Wait for confirmation that the PO Dispatch process is complete?" Click the Yes button. After the PO Dispatch process is ran, a new browser window will open.

4) Click the PO Dispatch (listed as **PODISP**) process in the new window. Click the blue link that says **Notify Success**. This takes you to the **Process Detail** page. Click the **View Log/Trace** link, at the bottom right.

5) This will open up a list of files. Click the one ending in .PDF. This will open up the

finalized Purchase Order as a .PDF document, which can then be printed or e-mailed, or printed and faxed to the vendor.